

4. CONCLUSION: APPLYING FOR AFI FUNDING

This guidebook has provided basic guidance about planning and implementing an AFI Project. If you are ready to move forward, below is one final tool to help you plan a successful AFI Project: a checklist of what to include in an application for Federal AFI funding. Please note that this is a general guide. Make sure you refer to the most recent program announcement as requirements may change from year to year.

- **Table of Contents.**
- **Project Summary/Abstract.** Your summary/abstract should not exceed one page in length. Be sure to include all the basic features of your project: the number of participants, the number of IDAs you will open, the amount of Federal funding you are requesting and the amount of your nonfederal share commitments, a brief description of the target population and geographic location for the project, the match rate, and the qualified asset goals. Be sure to note the major financial institution partner and other collaborators or partners. This is a great place to highlight any unique or innovative elements of your program model.
- **Project Narrative.** The written portion of the application (e.g., objectives and needs for assistance; results or benefits expected; approach; evaluation; and organizational profiles) must not exceed a maximum number of pages, excluding charts and appendices. See the latest program announcement for details.
- **Standard Form 424: Application for Federal Assistance.** Make sure the chairperson or executive director of the submitting organization signs this. You can find this two-page form on the Web, at <http://www.acf.hhs.gov/programs/ofs/forms.htm/>.^{*} See Appendix N for a sample of this form.
- **Standard Form 424A: Budget Information – Non-Construction Programs.** You can find this four-page form at <http://www.acf.hhs.gov/programs/ofs/forms.htm/>.[†] See Appendix N for a sample of this form.
- **Budget and Budget Justification.** This should include not only a comprehensive budget for the five years of the project, but also a narrative detailing the source of these estimates and the sources of income and other resources dedicated to cover these costs.
- **Standard Form 424B: Assurances – Non-Construction Programs.** You can find this two-page form online, at <http://www.acf.hhs.gov/programs/ofs/forms.htm/>.[‡]

^{*}From this site, scroll down the page to **Grants Application Forms**. Click on the link **Application for Federal Assistance SF-424**.

[†]From this site, scroll down the page to **Grant Application Forms**. Click on the link **Budget Information - Non-Construction Programs SF-424A**.

[‡]From this site, scroll down the page to **Assurances**. Click on the link **Non-Construction Programs SF-424B**.

- **Certification Regarding Lobbying – Certification for Contracts, Grants, Loans, and Cooperative Agreements.** You can find this form, roughly a page long, at <http://www.acf.hhs.gov/programs/ofs/grants/lobby.htm/>.
- **Standard Form LLL – Disclosure of Lobbying Activities.** You can find this two-page form at <http://www.acf.hhs.gov/programs/ofs/forms.htm/>.^{*} Note that if your organization does not engage in lobbying activities of any kind,[†] you do not need to complete and submit this form.
- **Proof of Nonprofit Status.** The applying organization must include a copy of its 501(c)3 status. This may be in the form of the IRS letter granting certification. It may also be in the form of downloaded documentation from the cumulative list of organizations eligible to receive tax deductions found on the IRS webpage at <http://www.irs.gov/charities/page/0,,id=15053,00.html>.

Private, nonprofit organizations are encouraged to submit with their applications the survey located under “Grant Related Documents and Forms,” “Survey for Private, Non-Profit Grant Applicants,” titled, “Survey on Ensuring Equal Opportunity for Applicants,” at: <http://www.acf.hhs.gov/programs/ofs/forms.htm>.

- **Proof of Low-Income Credit Union Status (if applicable).** Applicant Low-Income Credit Unions must submit official documentation that the National Credit Union Administration has designated the organization as such. For information about Low-Income Credit Unions, see <http://www.ncua.gov>.
- **Proof of Community Development Financial Institution Status (if applicable).** Applicant Community Development Financial Institutions must submit official documentation that the U. S. Department of the Treasury has designated the organization as such. For information about Community Development Financial Institutions, go to <http://www.cdfifund.gov>.

Additional information to include:

- **Evidence of Nonfederal Share Funds Committed.** Each application must include documentation that commits nonfederal funds *equal* to the amount of Federal funds requested for the program. If your program has multiple funders, there must be a letter of commitment or a Nonfederal Share Agreement for each funding source. See Appendix L for sample nonfederal share commitment letters.
- **Résumés and Job Descriptions.** Include résumés for existing staff that will play a role in the program’s design, implementation, or management. Include job descriptions for those relevant positions that have not yet been filled. See Appendix I for a sample job description.

^{*} From this site, scroll down the page to **Disclosures**. Click on the link **Disclosure of Lobbying Activities: revised to reflect the Lobbying Disclosure Act of 1995 SF-LLL**.

[†] Your chief financial officer usually can assist you in determining this, since lobbying activities must be claimed on tax forms for nonprofit organizations.

- **Partnership Agreements and Network Agreements.** If your program includes vital partnerships with other organizations providing services, such as asset training, counseling services, or other relevant support to your participants, include a letter documenting their commitment to provide these services. Include signed agreements with all members of a network participating in the AFI initiative.
- **Savings Plan Agreement.** Include here a draft of the savings plan agreement you intend to use with your participants. See Appendix E for sample savings agreements.
- **Letters of Commitment and Support.** Include other letters of support from key community institutions or leaders.
- **Relevant Program Information.** If you have information, such as sample marketing materials, financial education curriculum outlines, or surveys to be used in your in-house evaluations, include them as well.
- **Single Point of Contact Comments,** if applicable.

Information about applying online:

- **Grants.gov** is the new Federal website, which allows applicants to apply for Federal grants opportunities electronically. If you are applying through Grants.gov, the content of your application will be identical to what you would have submitted via mail. However, the process is slightly different. Applying this way is not as simple as sending an email with your application attached. Please make sure you carefully read the Grants.gov Website and go through the steps listed under “Prepare to Apply for Grants through Grants.gov.” Do this well ahead of the application due date. Go to: <http://www.grants.gov>.

Thank you for your interest in the Assets for Independence Program. If you have any additional questions about applying for AFI funding or have comments about this guidebook, please check out the AFI website or contact the AFI Program office.

Assets for Independence Program, Office of Community Services
 370 L’Enfant Promenade SW, Fifth Floor West Side
 Washington, DC 20447
 Phone: 202.401.4626
 Email: AFIProgram@acf.hhs.gov
 Web site: <http://www.acf.hhs.gov/assetbuilding>